Phoenix Program
Process Definition – Project Costing

Process	*Create Projects (Project Costing)*
Process Number	*PC - 001*

Description of Process

The Department of Transportation uses a project-based system to track revenues and expenditures. This process defines the method for creating projects in the PeopleSoft Project Costing module.   It is noted here that the Project/Grant chartfield in General Ledger must also be set up for each project and must match *exactly* the project set up in Project Costing. The Project/Grant type in General Ledger must be set up as Project. For information on how to set up the Project/Grant chartfield in PeopleSoft General Ledger, see General Ledger Process Number GL - 028: Creating a Project/Grant.

Input to Process

The Department of Transportation has several documents that it uses to set up projects. These include PR-37 forms, district letters, DOT 626 forms, and letting letters. Each of these forms goes through an approval process before being submitted to the Office of General Accounting for processing. These forms will provide the necessary information for entry into PeopleSoft.

Output of Process

A new project is created for use in the PeopleSoft Project Costing module.

Service Level Agreement Required? (if yes, provide a brief description)

N/A

PeopleSoft Panel Groups being Used

Function	Panel Group
Go	**Go – Manage Projects – Create Projects. This navigates to the menu group used to add projects.**
Use	**Use – Express Project – Express – Add. This is the entry panel for adding a new project.**

Business Process Description

Process Description	Responsibility (Agency/Centralized)
Step 1: Receive request form **Upon receiving the approved request form for a project, check to ensure that all required information has been provided and that all required signatures are in place.**	**Agency**
Step 2: Create identifiers for the new Project **Enter the Business Unit (48400) and the Project number that you wish to create.**	**Agency**
Step 3: Enter the required information for the new Project **On the new Express Project panel, enter the following required information:** • **Description of the project.** • **Project Type (i.e. STCN for state construction).** • **Sub-account (i.e. 50814 for MLP).** • **Responsibility Unit (Org Number of Managing Unit).** • **Activity (DOT).** • **Activity Description (DOT Activity).** • **PI number** **The Integration will default to DOT1, which is correct.**	**Agency**
Step 4: Save the new Project **The Project is now saved and ready for use in the Project Costing module.**	**Agency**

Forms Used with Process (#)

**Attach sample form(s)

Process Flow Diagram (if appropriate):
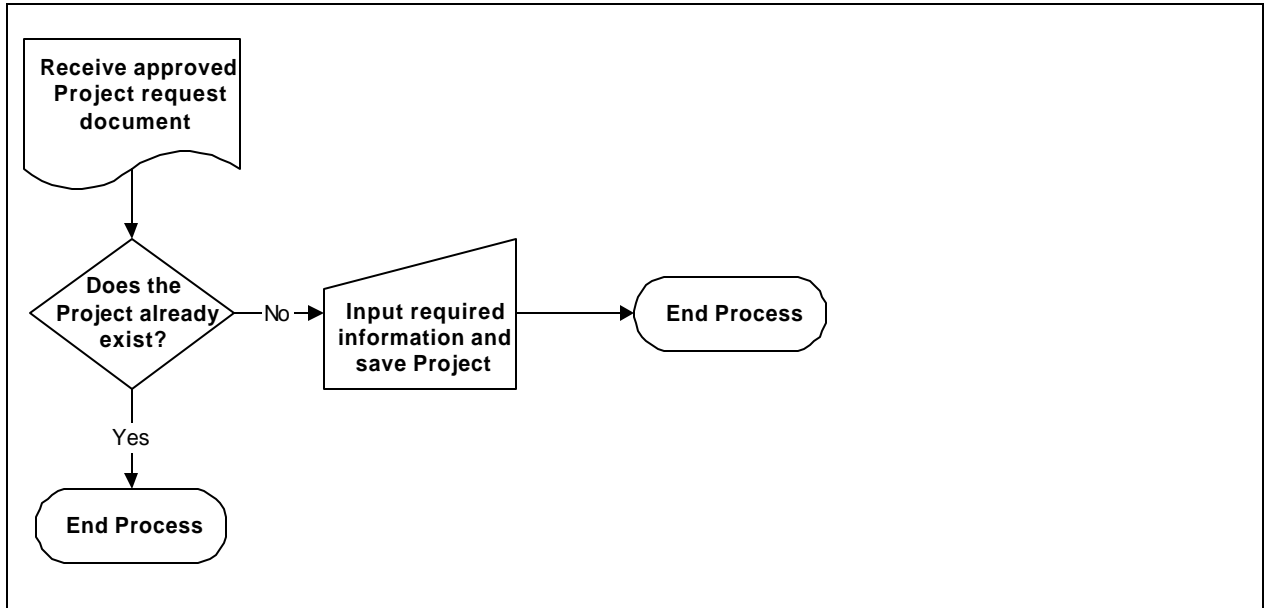
APPROVAL FORM

SIGNER	ROLE	APV	NOT APV	DATE
Jamie Simpson	DOAS Project Lead			
Dan Youngblood	THG Project Lead			